



LIVE FREE

2020 Fall Advertising  
Effectiveness Research

November 2020



# Background

- The travel and tourism sector has suffered its most difficult year ever in 2020 due to the COVID-19 pandemic that brought the industry to a halt in mid-March.
- What was initially expected to be a reasonably short event continues to drag on through the fall.
- In response to this situation, the New Hampshire Division of Travel and Tourism Development (the Division) halted its planned spring marketing efforts but ran a Recovery campaign in early summer. This summer recovery campaign was evaluated in an advertising effectiveness research wave that was completed in October.
- The Division then ran a fall campaign throughout September and October. The creative in this fall campaign is similar to the creative that aired last fall and included no COVID-19-focused messaging.
- These summer and fall efforts included a specific in-state focus to encourage residents to vacation in New Hampshire and support local business as well as out-of-state efforts.
- This current research wave is specifically designed to measure the impact of the fall 2020 effort both on travel and spending as well as upon the health of the New Hampshire brand. The objectives of this seasonal advertising effectiveness research include the following:
  - Measure awareness of the fall 2020 advertising among the target audience;
  - Evaluate the efficiency of the Division's media buy through SMARInsights' destination marketing organization (DMO) cost-per-aware household benchmarking;
  - Determine the ability of the creative to communicate desired messages, again using SMARInsights' benchmarking;
  - Assess the ability of the advertising to influence New Hampshire travel;
  - Calculate the number of ad-influenced trips, visitor spending, and return on investment;
  - Explore the impact of the advertising upon the brand; and
  - Forward insights into future refinement of the marketing.

# Methodology

- As has been the case in prior advertising effectiveness research for the Division, an online survey was used so that respondents could view the actual advertising. This approach provides a representative measure of aided ad awareness and allows respondents to provide their reaction to the creative.
- National sample vendors with representative panels are used so that the results can be projected to the population.
- In order to qualify for the survey, respondents had to be travel decision makers who regularly take overnight leisure trips of at least 50 miles from home. Respondents also had to be between the ages of 18 and 65.
- This fall the campaign was focused upon states in the northeast; the Canadian markets included in the past were not targeted given international travel restrictions.
- A total of 1,368 surveys were completed across the target markets. Upon completion of data collection, the results were cleaned, coded, and weighted to be representative of the population.
- The following report summarizes the research results. The questionnaire and the ads tested appear in the Appendix.

	Completed Surveys
New Hampshire	236
*New York (No NYC Proper)	236
Connecticut	202
Massachusetts	365
Rhode Island	165
Maine/Vermont/New Jersey	164
<b>Total</b>	<b>1,368</b>

\*Omits Kings County, Queens County, New York County, Bronx County, and Richmond County – as no fall ads aired in NYC Proper.

# Fall Campaign Overview

- While elements of prior fall campaigns were utilized in the executions, “Discover your New” was employed across all markets and media.
- The budget for these efforts was 16% smaller than in the prior year.
- The fall 2020 media includes online banners, social, and video ads.
- The investment was evenly distributed across markets except for Vermont and Maine – and no Canadian media aired.

	2018	2019	2020	% Change
Fall	\$305,338	\$278,113	\$233,288	-16%



Market	Online Display & Mobile (includes video ad)	Social	Total
NH	\$25,417	\$12,061	\$37,478
MA	\$25,417	\$12,061	\$37,478
RI	\$25,417	\$12,061	\$37,478
CT	\$25,417	\$12,061	\$37,478
NY (No NYC Proper)	\$25,417	\$12,061	\$37,478
NJ	\$25,417	\$12,061	\$37,478
VT	\$0	\$4,210	\$4,210
ME	\$0	\$4,210	\$4,210
Total	\$152,500	\$80,788	\$233,288



# Insights

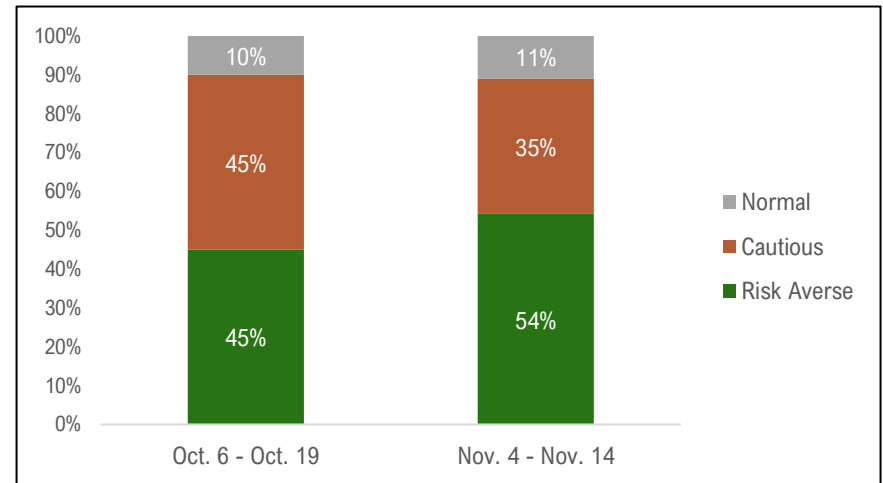
- The fall 2020 advertising faced the challenge of running in an environment where more than half of consumers believe it is still safer to stay home and venture out as little as possible – and nearly a third would not even consider traveling any time soon. Consumer sentiment has only worsened in the past month as COVID-19 cases have grown and will likely continue to do so as we enter the winter months.
- Given this context, the results of this advertising effectiveness research are quite positive:
- New Hampshire is in a strong competitive position given its outdoor leisure travel product that is conducive to social distancing and safe travel. New Hampshire continues to show growth in both top-of-mind consideration and share of intent to visit. And the advertising is clearly helping to drive this result.
- Advertising awareness is up significantly compared to prior fall campaigns despite a smaller investment. The gain is driven by using familiar creative in a more targeted geography. While awareness is up, a smaller target household base results in fewer ad-aware households. But with a smaller investment efficiency of the media buy in terms of cost per aware household is unchanged – and remains notably more efficient than industry benchmarks.
- Reaction to the fall 2020 advertising is quite positive – and more positive than in fall 2019. While stronger ad ratings amid a pandemic might be counter-intuitive, this type of result has emerged in other recent quantitative and qualitative research. Consumers are looking for escape from the constant reminders of COVID-19. Effective travel advertising provides a respite and prompts the positive feelings that come from dreaming about future leisure trips. The fall 2020 New Hampshire advertising is certainly effective in this regard.
- Ultimately, the fall 2020 advertising influenced about 71,000 New Hampshire trips and \$67 million in visitor spending between September and mid-November 2020. The advertising returned \$286 in visitor spending and \$16 in tax revenue for each \$1 invested in the media buy. These influenced trips and ROI figures are down compared to fall 2019, but it is still a positive result that the fall 2020 advertising was able to generate a positive ROI in the context of the pandemic. Moreover, the fall 2019 ROI results were some of the strongest that SMARInsights has seen.
- The pandemic also drove some differences in New Hampshire trips. Specifically, fall 2020 visitors were more likely to participate in many outdoor and/or social distance-friendly activities and less likely to participate in most indoor activities. They were also more likely to camp and to visit the more rural areas of the state.

# Pandemic Environment

# Risk Assessment

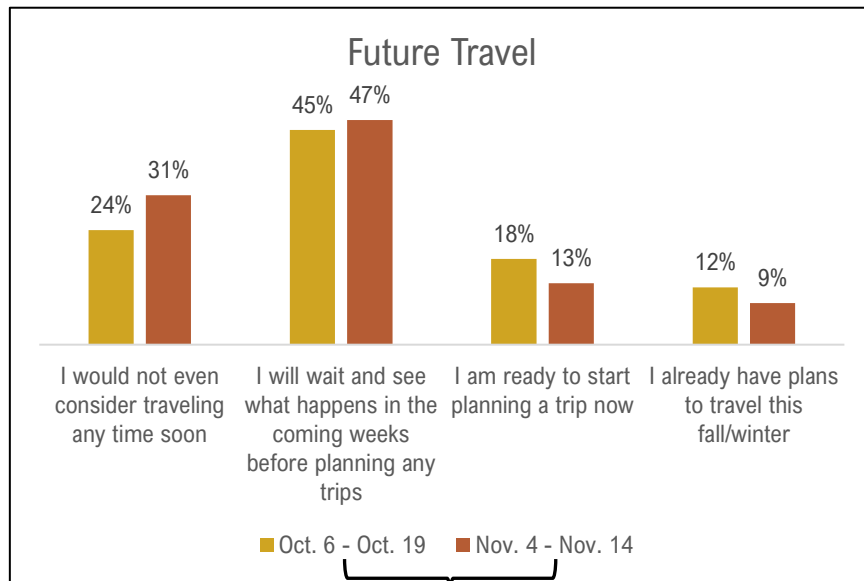
- The COVID-19 pandemic has certainly reshaped travel due to lockdowns and restrictions. These measures were gradually relaxed as cases dropped throughout the summer, but the travel recovery was slow. This can be seen in metrics like hotel occupancy, which remains well below the prior year despite improving each month. And now cases are rising as we transition into fall and winter, which will likely lead to more lockdowns and restrictions.
- As part of this research, consumers are characterized into the three groups described below. Importantly, the percentage of risk averse consumers has increased in the past month. And very few intend to go about their normal routines.

Normal	I think restrictions have gone on too long and I'm going to resume as many normal activities as possible
Cautious	I will take recommended precautions, but I'm going to start adding more activities back into my routine
Risk Averse	I believe it is still safer to stay home and venture out as little as possible (only for essential items or because of my job as an essential worker)

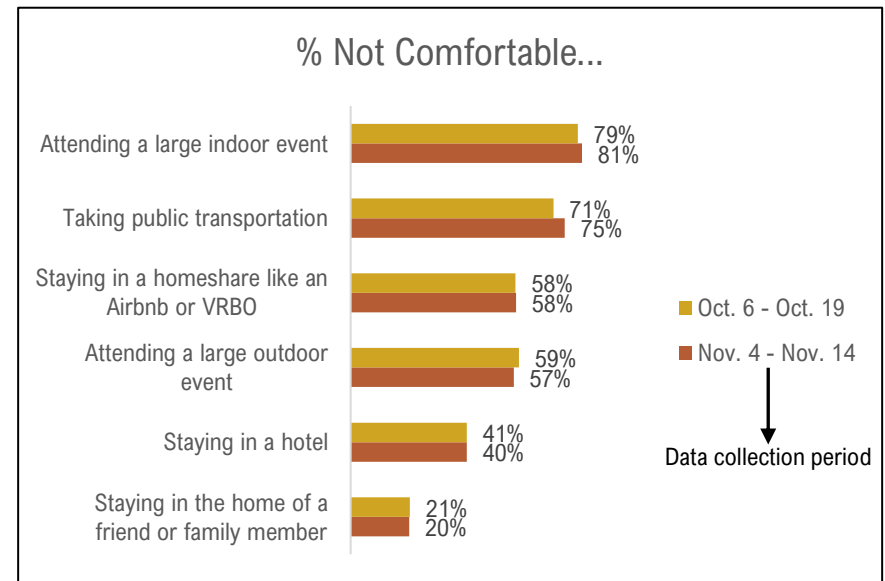


# Travel Intentions & Comfort Level

- We also see growth in the proportion of consumers indicating that they would not consider traveling any time soon. More also indicate that they are waiting to see what happens before planning any trips.
- While there is clear change (more caution) in terms of overall risk assessment, the comfort level with scenarios is basically unchanged in the past month.



Data collection period

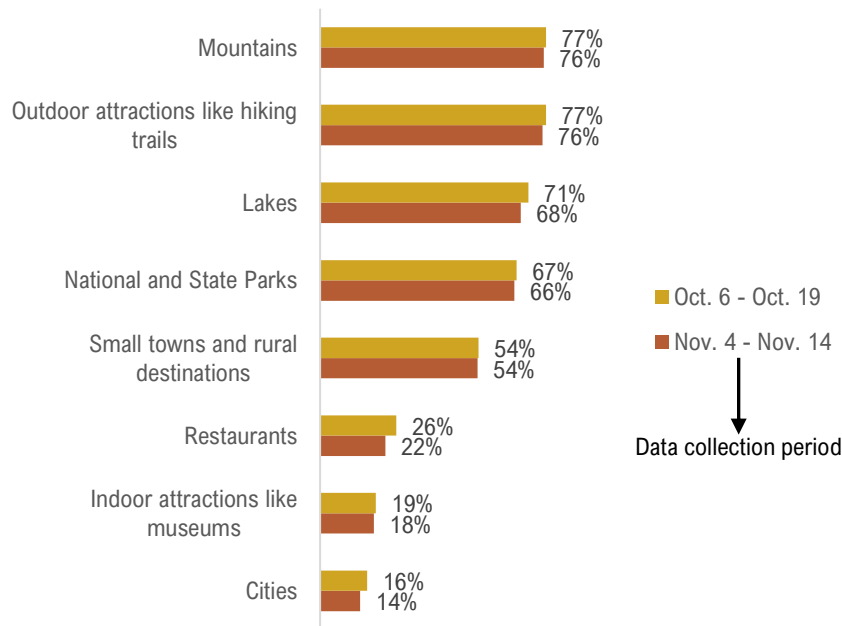




# Locale & Destination Safety Perception

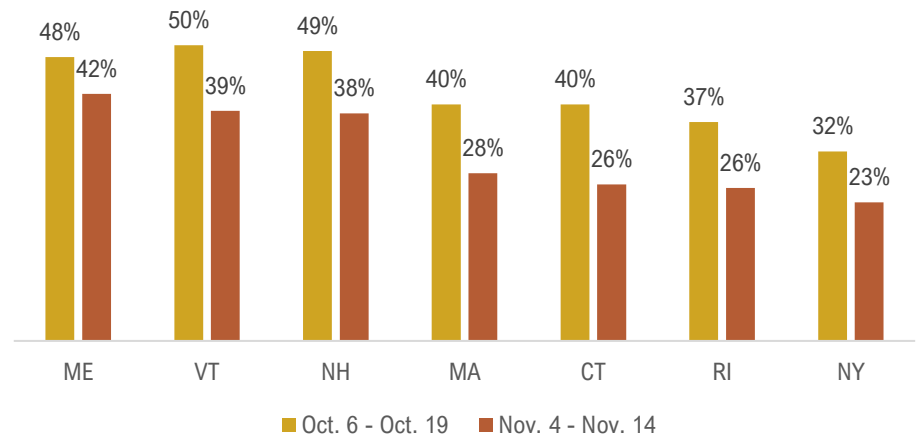
- Interestingly, in many ways a prevailing cautious attitude translates into a competitive advantage for New Hampshire – with mountains, hiking trails, lakes, parks, and small towns being perceived as relatively safe locations.

% Perceived to be Totally or Somewhat Safe



- While New Hampshire is perceived to be among the safest destinations, safety perception for all states took a hit in the past month.

% Perceived to be Totally or Somewhat Safe

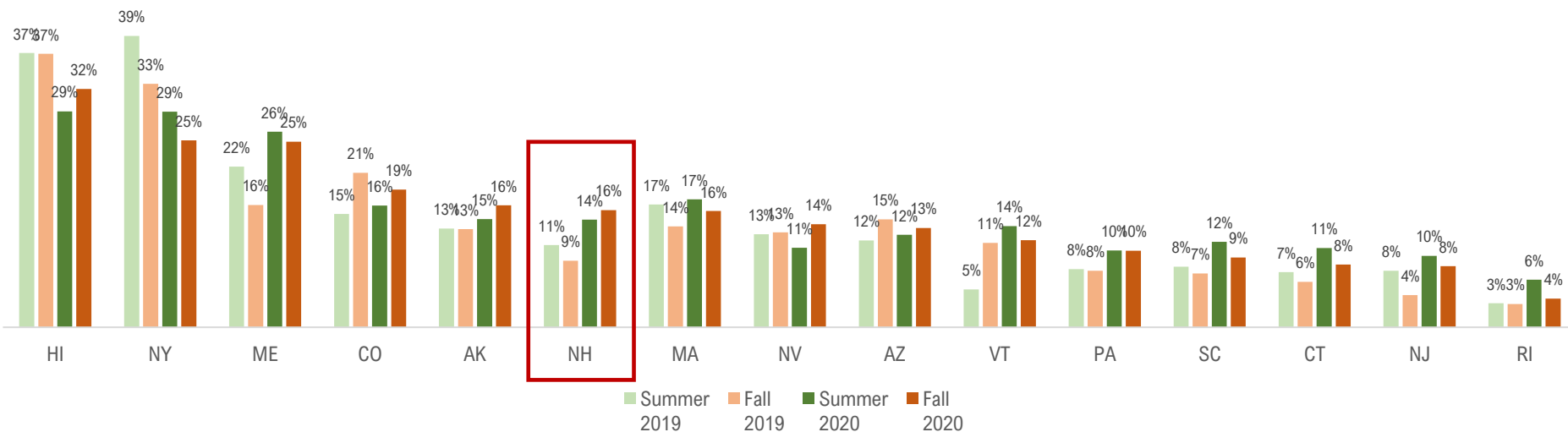


# Brand Health

# Brand Health Considerations

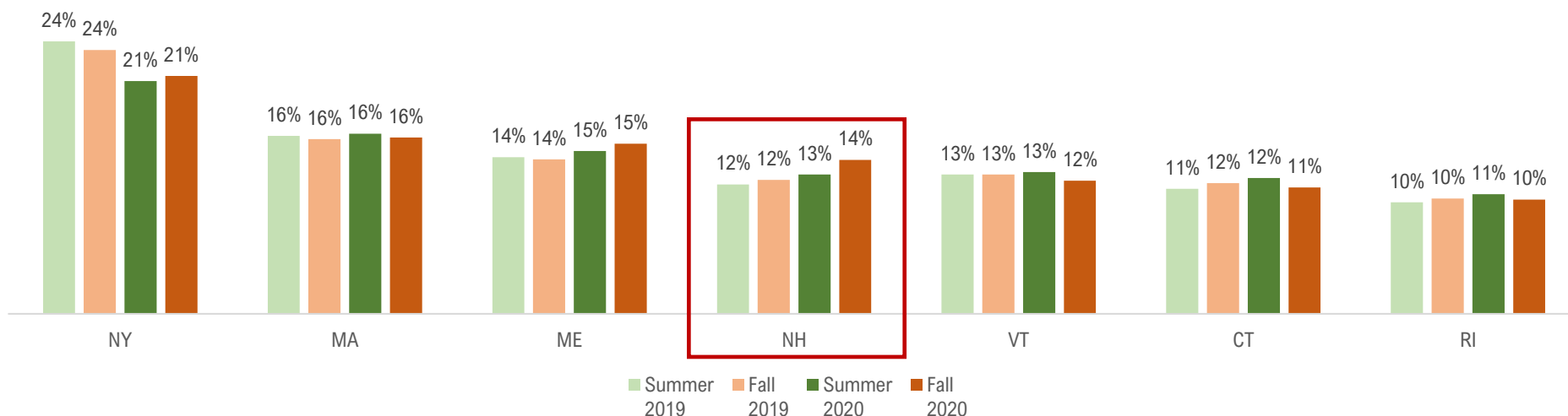
- The key focus of advertising effectiveness research has traditionally centered upon incremental travel and return on investment – or simply the payback on the promotion of the state as a destination.
- In the context of the pandemic, it's important to take a broader view and think about the state of the New Hampshire brand. In the immediate term, it is reasonable to believe that travel will be depressed. But advertising has impact beyond generating travel by building an image of the state and strengthening its appeal.
- So, before we look at advertising and its impact, we first want to consider how the brand itself has fared since summer 2019 in terms of some key measures.

# Top-of-Mind Consideration



- One of the more interesting measures relates to the places that come to mind as good states to visit – what could be called top-of-mind consideration.
- In the environment of the pandemic where we have seen appeal skewing toward outdoor locations, the biggest gainers are places like New Hampshire, Vermont and Maine. Again, the outdoor product focus is ideally positioned in this context.
- The states that suffer most are places like New York where the focus is on the city and which people currently feel less comfortable visiting. And interestingly, Hawaii – no doubt in part because of the long plane ride required.

# Share of Intent to Visit



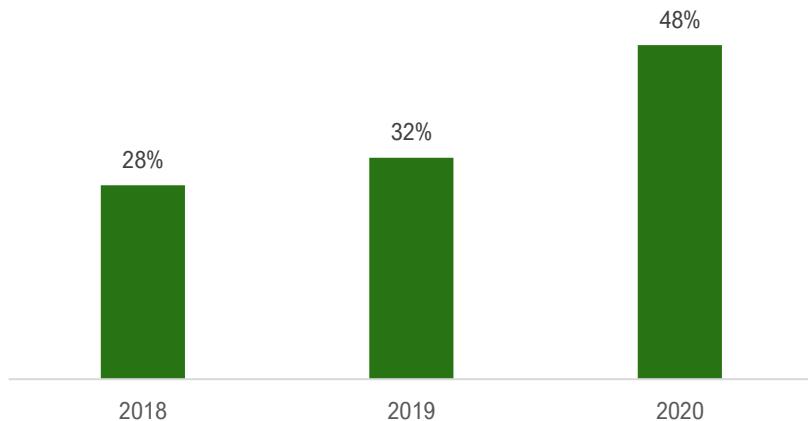
- Perhaps the most important attitudinal measure is share of intent to visit, as it serves as a signal for future travel behavior.
- Again, New Hampshire shows a gain in this usually stable measure. And again, New York shows the greatest decline.

# Ad Awareness



# Fall Ad Awareness

Fall Ad Awareness



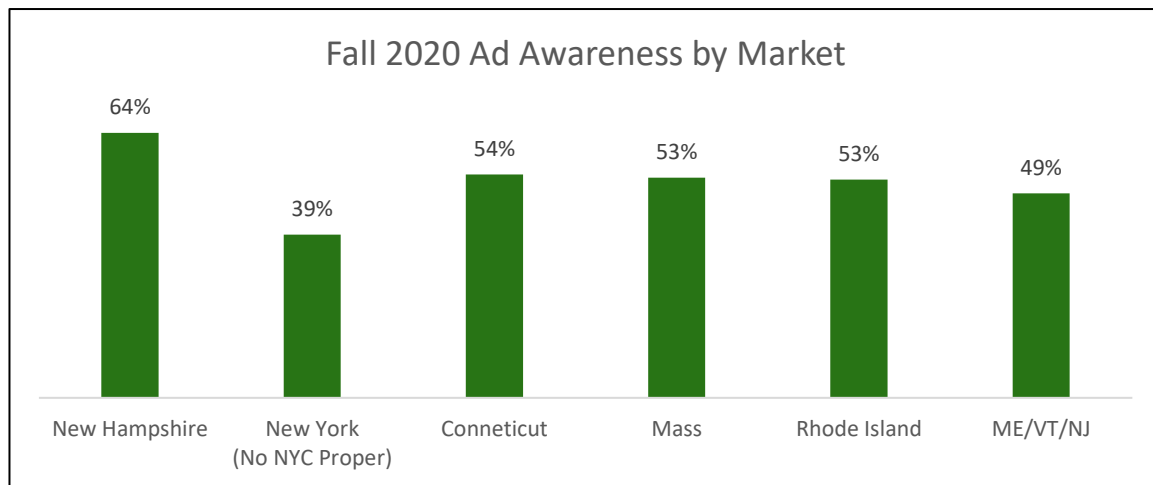
	Fall 2018	Fall 2019	Fall 2020
Targeted HHs	18,270,009	19,205,673	*9,612,930
Recall	28%	32%	48%
Aware HHs	5,185,047	6,150,380	4,641,103
Media Spending	\$305,338	\$278,113	\$233,288
<b>Cost per Aware Household</b>	<b>\$0.06</b>	<b>\$0.05</b>	<b>\$0.05</b>

\*Does not include Canada markets or the five counties that comprise New York City Proper

- Advertising awareness is up significantly compared to prior fall campaigns despite a smaller investment. The gain is driven by using familiar creative in a more targeted geography (no Canada or NYC).
- While awareness is up, the smaller target household base results in fewer ad-aware households. But with a smaller investment the cost per aware household, which is a measure of media buy efficiency, is unchanged. As additional context, the average cost per aware household for a relatively small budget (< \$300K) advertising campaign is \$0.26, highlighting that the New Hampshire fall media buys are remarkably efficient.

# Fall 2020 Ad Awareness by Market

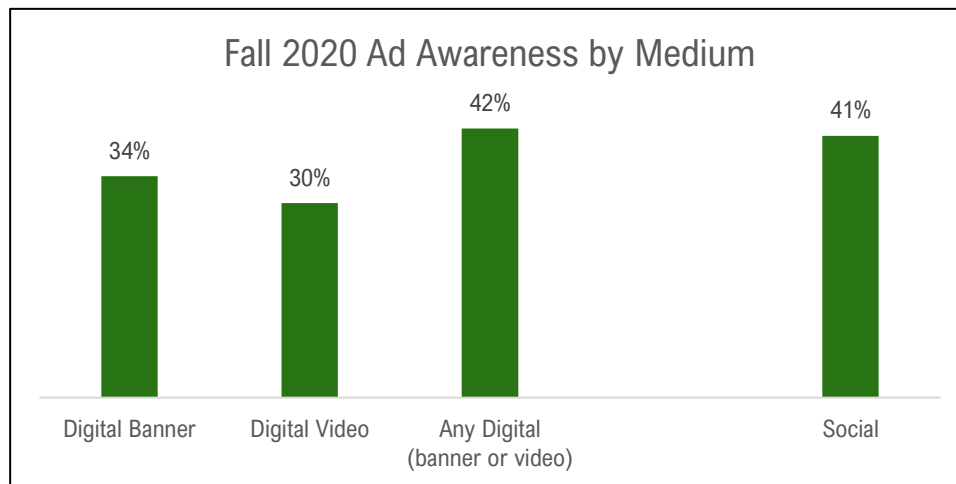
- Fall 2020 ad awareness is highest in-state, but New Hampshire is a small market, which leads to a relatively high cost per aware household.
- In this regard, the media buy was most efficient in New York and the group of Maine, Vermont, and New Jersey.



	New Hampshire	New York (No NYC Proper)	Connecticut	Mass	Rhode Island	ME/VT/NJ	Total
Targeted HHs	391,741	2,940,207	1,016,939	1,937,419	308,391	3,018,233	9,612,930
Recall	64%	39%	54%	53%	53%	49%	48%
Aware HHs	250,648	1,158,641	548,744	1,029,751	162,606	1,490,713	4,641,103
Media Spending	\$37,478	\$37,478	\$37,478	\$37,478	\$37,478	\$45,898	\$233,288
<b>Cost per Aware Household</b>	<b>\$0.15</b>	<b>\$0.03</b>	<b>\$0.07</b>	<b>\$0.04</b>	<b>\$0.23</b>	<b>\$0.03</b>	<b>\$0.05</b>

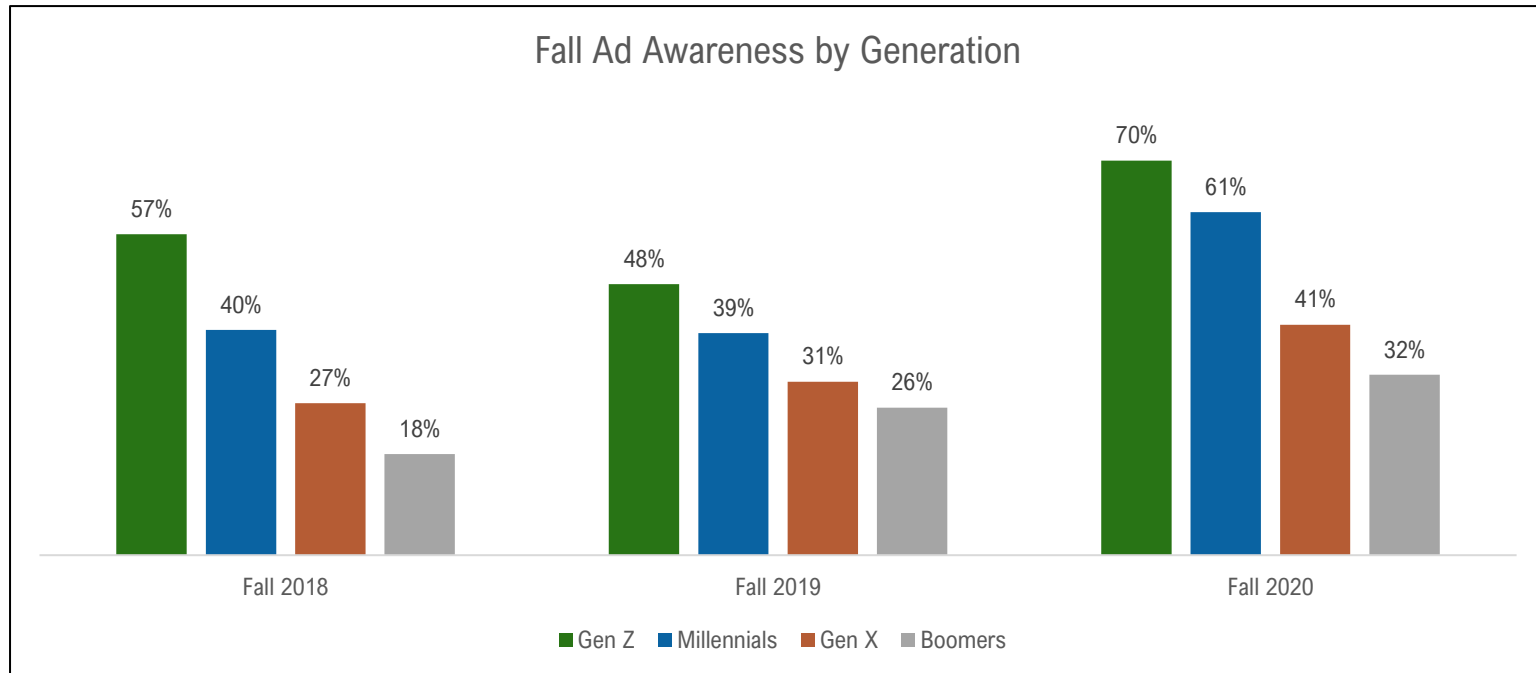
# Fall 2020 Ad Awareness by Medium

- The fall 2020 campaign included digital banners, a digital video, and social media advertising.
- Of these media, social generated the highest awareness at 41%. Social advertising was also relatively efficient at \$0.02 per household reached.
- The digital media dollars encompass both digital banners and the digital video – so these media are grouped for the purposes of establishing awareness and cost per aware household. Together, the digital banners and video reached 42% of consumers at \$0.04 per aware household.



	Digital (Banners and Video)	Social
Targeted HHs	9,612,930	9,612,930
Recall	42%	41%
Aware HHs	4,006,800	3,900,520
Media Spending	\$152,500	\$80,788
Cost per Aware Household	\$0.04	\$0.02

# Fall Ad Awareness by Generation

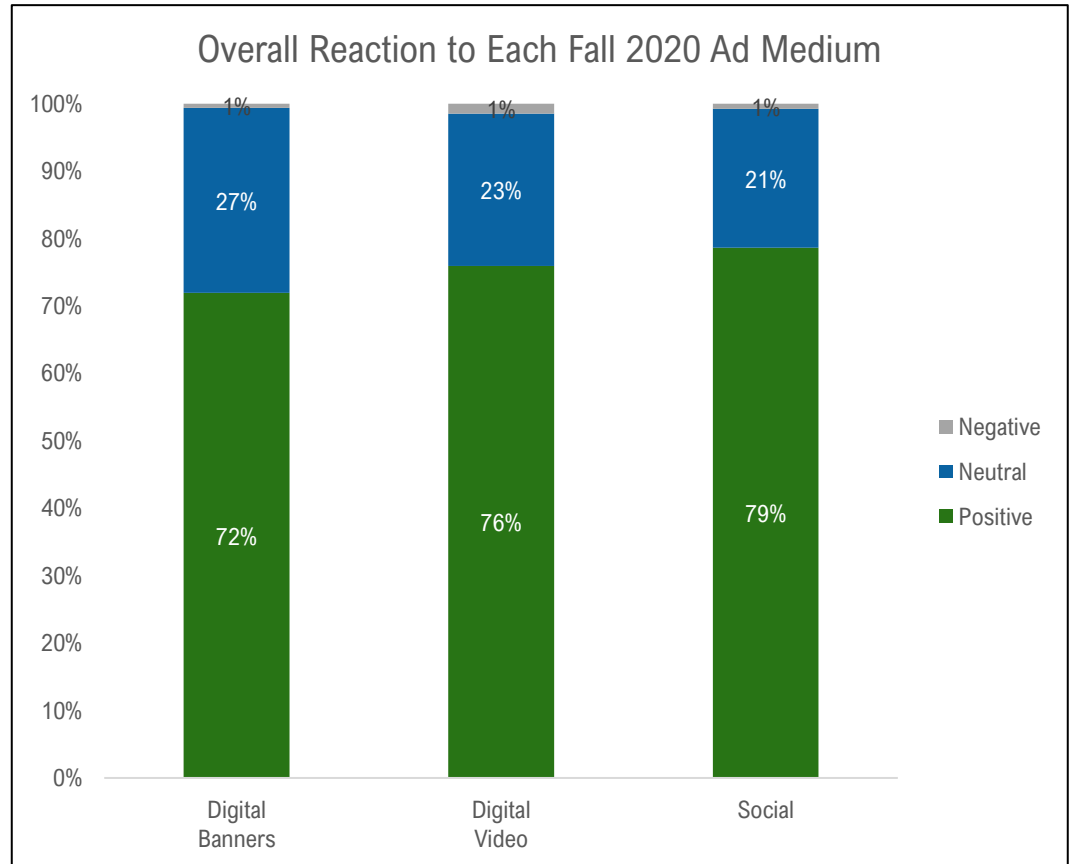


- Advertising awareness has been consistently higher among younger consumers due to the digital orientation of the media buy. This result should, of course, be also considered in light of demographic targeting strategy.

# Creative Ratings

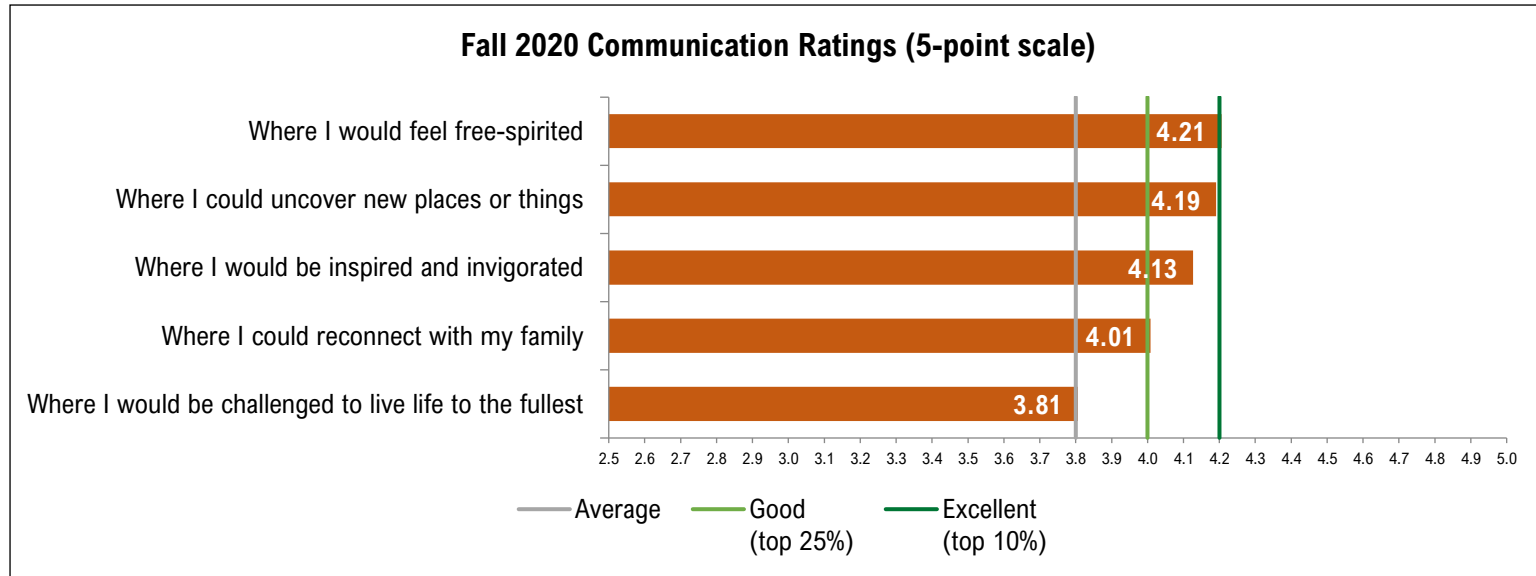
# Overall Reaction to Each Fall 2020 Ad Medium

- There is a mostly positive reaction to each element of the fall 2020 advertising campaign.
- The social ads and the video ad garner the highest proportion of positive responses.
- And essentially no consumers have a negative reaction to the ads.



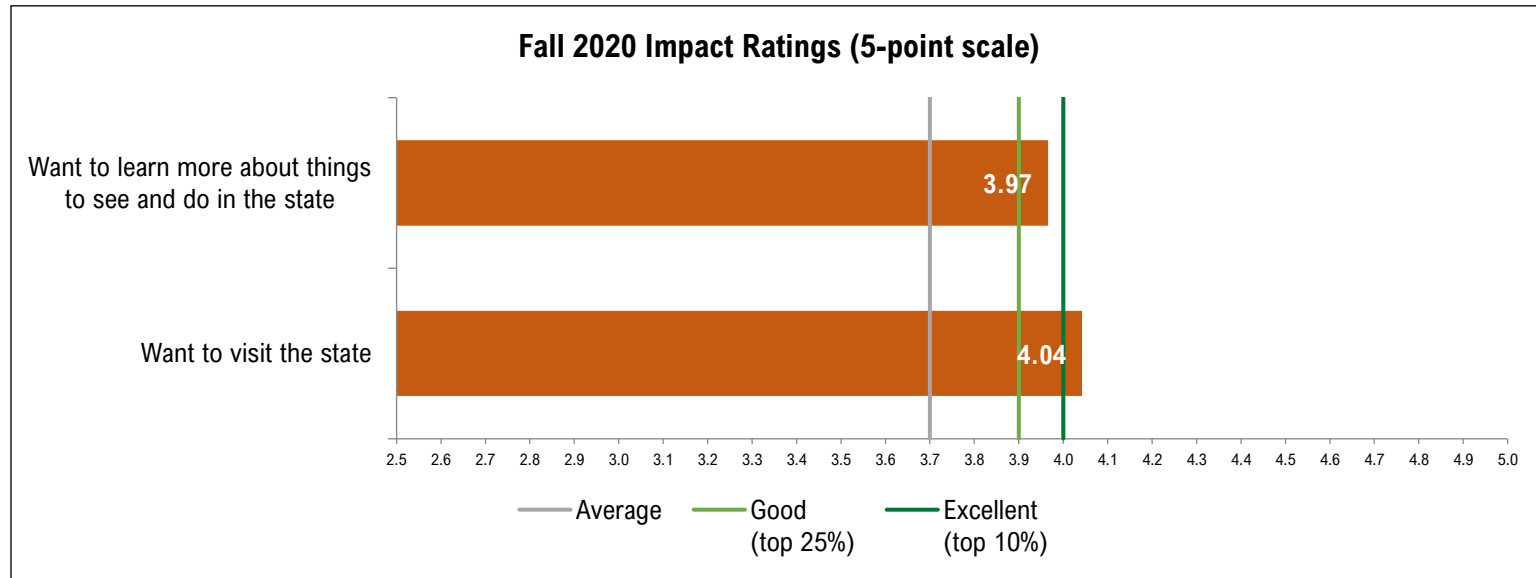


# Fall 2020 Campaign Communication Ratings



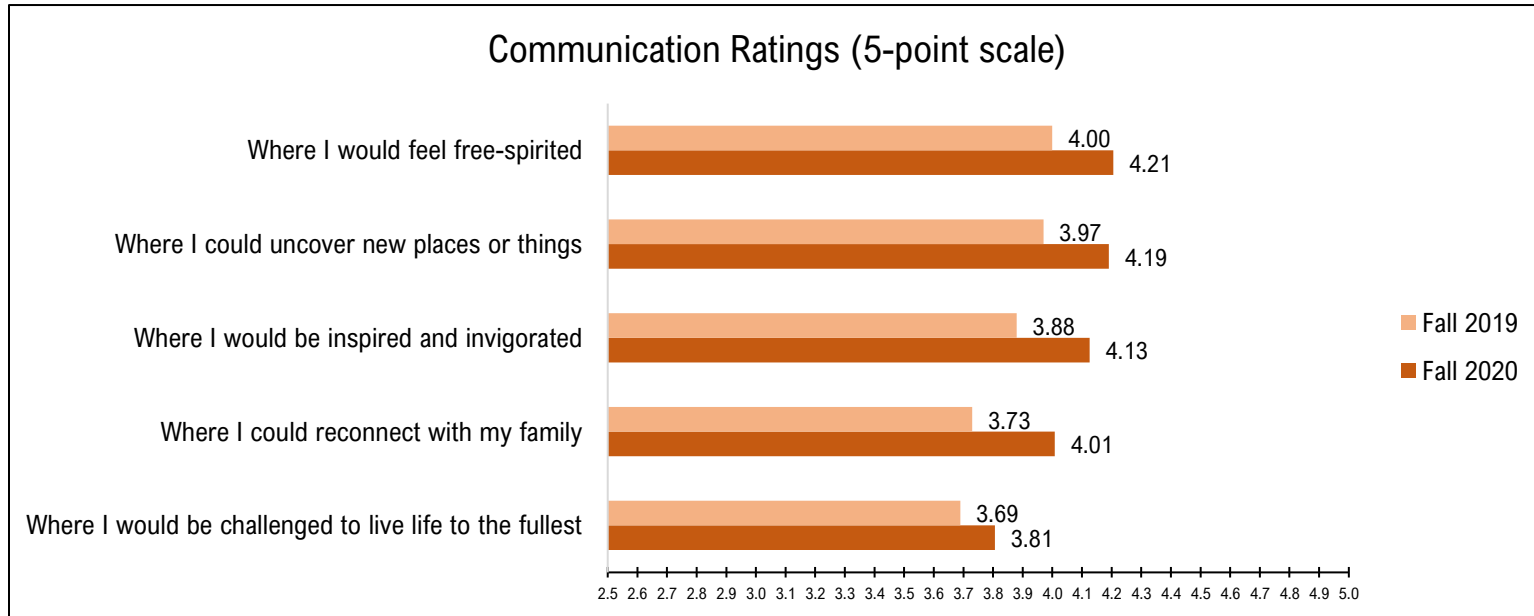
- The fall 2020 ads excel at communicating that New Hampshire is a *free-spirited* place where visitors can *uncover new places or things*.
- The campaign is also effective at portraying an *inspiring* place to *connect with the family*.

# Fall 2020 Campaign Impact Ratings



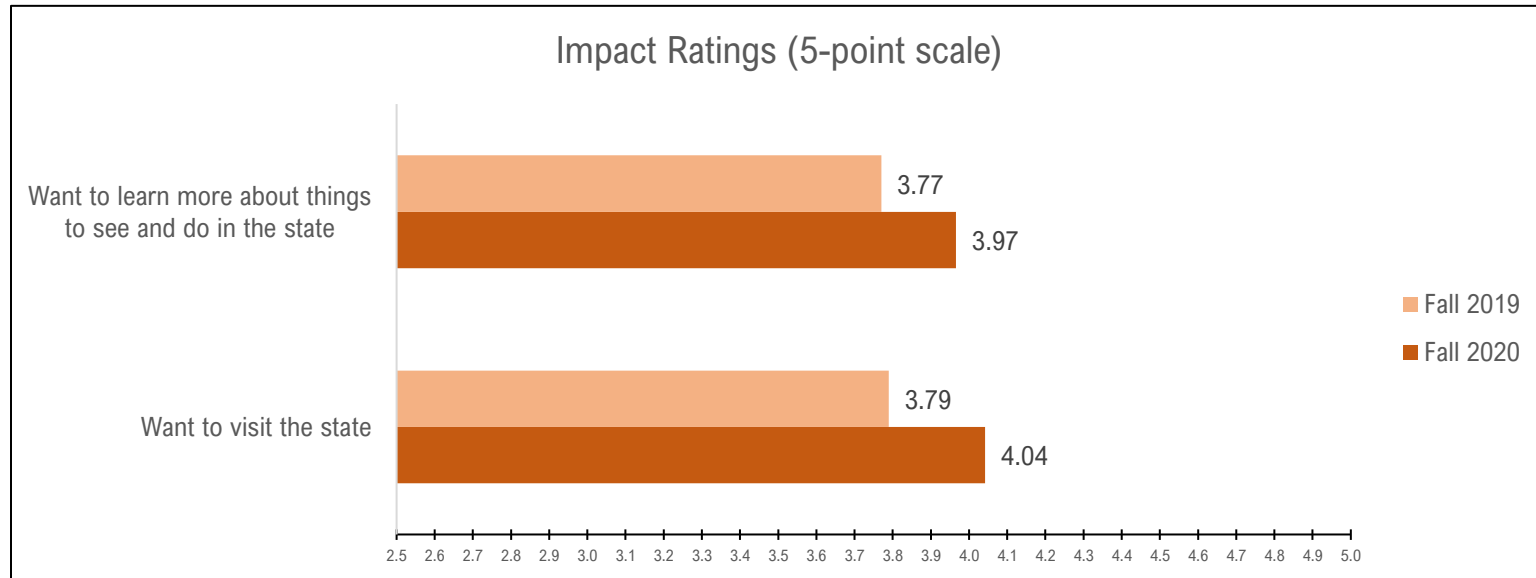
- The fall 2020 ads also rate in the excellent benchmark range for making consumers want to visit the state.

# Communication Ratings Change



- One might assume that consumers would have a less positive reaction to travel advertising during a pandemic that thwarts leisure travel. On the contrary, ad ratings are up this fall. We have seen similar results in other recent quantitative and qualitative research – consumers are looking for escape from the constant reminders of COVID-19. Effective travel advertising provides a respite and prompts the positive feelings that come from dreaming about future leisure trips.

# Impact Ratings Change



- Like the communication ratings, the impact ratings that relate to generating interest in visiting the state also grew year-over-year.
- While the ad ratings improvements are certainly a positive result, we must remember the reality of the moment in which leisure travel is undoubtedly depressed. The next section of this report will reveal the ultimate impact of the fall 2020 advertising on New Hampshire travel with comparisons to past results.

# Fall 2020 Campaign Ratings by Generation

	<div>Below average across groups</div> <div>Average across groups</div> <div>Above average across groups</div>			
	<b>Gen Z (18-24)</b>	<b>Millennials (25-40)</b>	<b>Gen X (41-56)</b>	<b>Boomers (57-65)</b>
Where I would be inspired and invigorated	4.00	4.11	4.20	4.11
Where I could reconnect with my family	3.79	4.02	4.09	3.95
Where I would feel free-spirited	4.27	4.21	4.27	4.13
Where I would be challenged to live life to the fullest	3.59	3.82	3.88	3.76
Where I could uncover new places or things	4.15	4.21	4.19	4.18
Want to learn more about things to see and do in the state	3.97	4.03	4.06	3.79
Want to visit the state	4.09	4.08	4.15	3.87

- A review of ad ratings by generation reveals that Gen X is the most positive overall, but there are different appeals to different generations. Namely, the ads make Gen Z feel free-spirited – and they show Millennials where they can uncover new places or things. Boomers are clearly a more challenging target.

# Fall 2020 Campaign Ratings by Market

Below average across groups

Average across groups

Above average across groups

	New Hampshire	New York (No NYC Proper)	Connecticut	Mass.	Rhode Island	ME/VT/NJ
Where I would be inspired and invigorated	4.46	4.13	4.31	4.18	4.21	3.98
Where I could reconnect with my family	4.35	3.98	4.19	4.13	3.99	3.85
Where I would feel free-spirited	4.41	4.19	4.41	4.32	4.25	4.04
Where I would be challenged to live life to the fullest	4.15	3.69	4.00	3.90	3.81	3.75
Where I could uncover new places or things	4.38	4.25	4.38	4.21	4.15	4.04
Want to learn more about things to see and do in the state	4.31	3.90	4.13	4.03	4.01	3.88
Want to visit the state	4.35	3.94	4.24	4.21	4.22	3.91

- New Hampshire residents clearly have the most positive reaction to the ads, followed by those from Connecticut.
- Those from New York, Maine, Vermont, and New Jersey have a less positive reaction to the ads. The challenge with those from Maine and Vermont may lie in competitive sentiment resulting from similarity of product (and feeling that their version is superior). This is simply a hypothesis that could be explored in more in-depth creative testing.



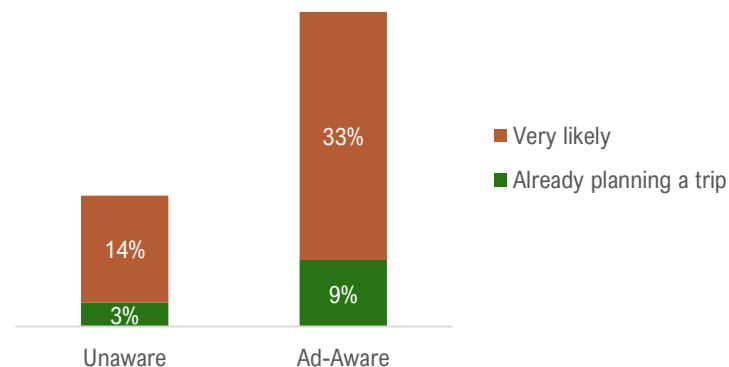
# Advertising Impact

# Consideration & Intent

New Hampshire comes to mind as a good place for a leisure trip or vacation



Likelihood to visit NH in the next year



- The fall 2020 campaign results in more consideration of New Hampshire as a good place for leisure travel – and in greater intent to travel to/in the state in the next year.

# Perceptions

- The advertising is helping to strengthen the New Hampshire brand, putting the state in an advantageous competitive position as we navigate the pandemic.

New Hampshire...	Unaware	Ad-Aware	Difference
Is a good place for shopping	3.59	3.96	0.37
Has great parks	3.92	4.28	0.36
Always has something new to discover	3.71	4.03	0.32
Offers great vacations for people like me	3.86	4.18	0.32
Is unique because of the variety of destinations and activities it offers vacationers	3.73	4.04	0.31
Is a kid-friendly vacation destination	3.90	4.20	0.30
Is rich in culture and the arts	3.34	3.64	0.30
Is a great place to vacation when traveling with children	3.84	4.14	0.30
Is a fun and exciting place	3.73	4.02	0.29
Has interesting historical sites and museums	3.65	3.93	0.28
Is a good place for culinary activities, including U-pick farms and beer/wine trails	3.64	3.91	0.27
Is a place I would be excited to visit for a leisure trip	3.87	4.13	0.27
Is safe	3.86	4.09	0.23
Is a good place for fairs and festivals	3.75	3.98	0.23
Offers an attractive lifestyle	3.82	4.03	0.21
Is affordable	3.94	4.14	0.20
Is beautiful	4.39	4.59	0.20
Is easy to get to	4.17	4.35	0.18
Is a good place for water activities	3.77	3.93	0.16
Is a good place to go to the beach	3.28	3.44	0.16
Offers lots of outdoor recreation	4.30	4.44	0.14

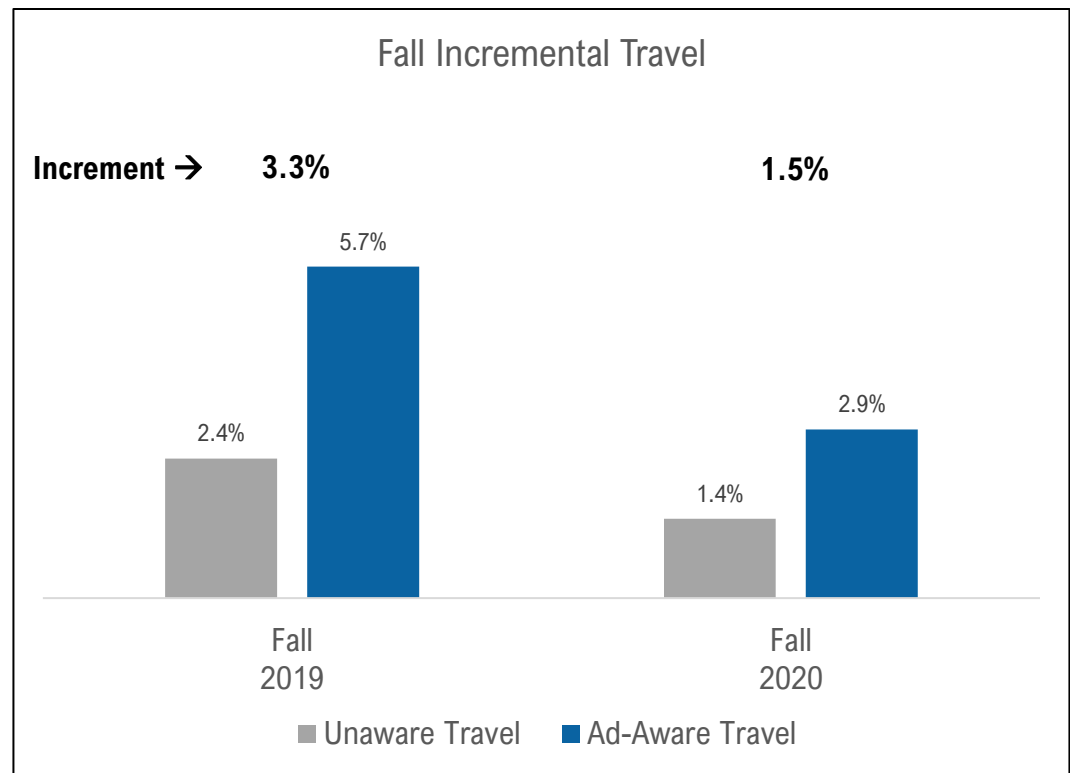
# Incremental Travel Review

- SMARInsights' methodology for measuring advertising impact relies on establishing a base rate of travel. Certainly, travel to New Hampshire would occur in the absence of advertising. Thus not all travel, or even travel by aware households, is attributable to the ads. Rather, the level of travel among unaware consumers is considered the base rate of travel that would occur without any advertising influence. Any travel above that base by ad-aware consumers is what is considered influenced. As such, accounting for only this *incremental travel* is a conservative measure of influence.
- As in the past, for this fall review we are counting only travel that occurred between September and November that did not include a stay at the visitor's vacation home or the home of family/friends.



# Incremental Travel

- The fall 2020 advertising had a positive impact on New Hampshire leisure travel.
- The level of incremental travel (and overall travel) is lower than in fall 2019, a result driven by the COVID-19 pandemic.
- Nevertheless it is a positive result that the advertising is able to influence additional New Hampshire leisure travel in such a challenging environment.



# Incremental Trips

- The fall 2020 advertising influenced about 71,000 New Hampshire trips between September and November 2020.
- Given a smaller target audience, fewer ad-aware households, and a lower level of ad-influenced travel, the quantity of incremental trips declined by about two-thirds in fall 2020 as compared to Fall 2019.

	Fall 2019	Fall 2020	% Change
Target HHs	19,205,673	9,612,930	-50%
Ad Awareness	32%	48%	51%
Ad-Aware HHs	6,150,380	4,641,103	-25%
Incremental Travel	3.3%	1.5%	-54%
<b>Incremental Trips</b>	<b>204,124</b>	<b>71,415</b>	<b>-65%</b>



# Return on Investment

	Fall 2019	Fall 2020	% Change
Influenced Fall Trips	204,124	71,415	-65%
Avg. Trip Spending (among ad-aware visitors)	\$904	\$936	3%
Influenced Trip Spending	\$184,568,565	\$66,818,515	-64%
Media Spending	\$278,113	\$233,288	-16%
<b>ROI</b>	<b>\$664</b>	<b>\$286</b>	<b>-57%</b>

- The fall 2020 advertising returned \$286 in visitor spending for each \$1 invested in the media buy.
- This is large decline compared to the fall 2019 ROI, but it is important to note that the \$664 ROI achieved last fall is among the highest that SMARInsights has ever reported.

# Tax Return on Investment

	Fall 2019	Fall 2020	% Change
Influenced Fall Trips	204,124	71,415	-65%
Avg. Taxable Spending (among ad-aware visitors)	\$578	\$594	3%
Influenced Taxable Spending	\$118,075,492	\$42,418,245	-64%
Taxes Generated	\$10,626,794	\$3,817,642	-64%
Media Spending	\$278,113	\$233,288	-16%
<b>Tax ROI</b>	<b>\$38.21</b>	<b>\$16.36</b>	<b>-57%</b>

- New Hampshire has no sales tax on goods and services, so only those related to lodging, meals and transportation are taxed.
- Based on the average visitor spending on the taxable categories, the fall 2020 advertising generated \$3.8 million in taxes. Given media spending, the ads returned \$16.36 in tax revenue for each \$1 invested.
- This marks a decline compared to the remarkably strong fall 2019 result, but it is still a positive result that the advertising was able to influence tax revenue and a tax ROI in the context of the pandemic.

# Trip Specifics

This section includes a review of fall 2020 trip activities, travel party make-up, spending, and lodging – and highlights changes compared to fall 2019.

# Trip Activities Change

New Hampshire Trip Activity	2019	2020	Difference
Hiking or backpacking	21%	38%	17%
Visiting a state or national park	20%	31%	11%
Scenic drive	45%	53%	7%
Bicycling or mountain biking	3%	10%	7%
Canoeing or kayaking	8%	13%	5%
Wildlife watching	15%	20%	5%
Fishing	5%	10%	5%
Horseback riding	2%	7%	5%
Hunting	0%	4%	3%
Bird watching	7%	9%	3%
Camping	11%	13%	2%
Golfing	4%	6%	2%
Attending a play or concert	4%	6%	1%
Boating	6%	7%	1%
Farm to table dinner	9%	10%	1%
ATVing	1%	2%	1%
Rock climbing	3%	3%	0%

New Hampshire Trip Activity	2019	2020	Difference
Brewery	14%	14%	-1%
Farmer's markets/U-picks/roadside stand	17%	16%	-1%
Visiting historical sites	19%	17%	-2%
Visiting museums	14%	11%	-3%
Visiting a noteworthy bar or nightclub	9%	6%	-3%
Dining at locally owned restaurants	46%	42%	-4%
Winery tours	10%	6%	-4%
Sightseeing tour	18%	13%	-5%
Attending a festival or fair	14%	7%	-8%
Shopping	47%	36%	-11%

- The impact of the pandemic is also apparent in the incidence of New Hampshire visitor activities.
- As compared to fall 2019, fall 2020 visitors are more likely to participate in many outdoor and/or social distance-friendly activities and less likely to participate in most indoor activities. The greatest gains are for hiking and visiting parks, while the greatest declines are seen for festivals and shopping.

# Other Trip Specifics Change

- Travel party, spending, and lodging are not dramatically different year-over-year, but it is worth noting that more fall 2020 visitors indicate camping or staying in a luxury resort – while fewer indicate staying in an Airbnb or traditional B&B.

Trip Specifics	Fall 2019	Fall 2020
Nights in New Hampshire	2.5	2.5
People in your travel party	3.1	2.7
Kids on trip	34%	25%
Overall average spending	\$774	\$834
Per person/per day spending	\$100	\$121
<b>Lodging</b>		
Camping/RVing	9%	14%
Luxury resort hotel	7%	12%
Mid-level hotel	27%	30%
Vacation home	7%	9%
Budget hotel or motel	9%	10%
Home of family or friends	26%	28%
High-end full-service hotel	9%	9%
Airbnb	13%	12%
Bed and breakfast/Inn	13%	10%

# Regions Visited Change

Region Visited	Fall 2019	Fall 2020	Difference
Monadnock Region	5%	13%	8%
Lake Region	26%	30%	5%
Great North Woods	10%	14%	4%
Seacoast	14%	15%	2%
Dartmouth/Lake Sunapee	11%	11%	0%
White Mountains	49%	47%	-2%
Merrimack Valley	21%	15%	-6%

- The White Mountains continue to be the most visited region, but there was a shift toward visiting the lesser-known/more rural parts of the state during the pandemic.



# Appendix: Questionnaire

# Questionnaire

## New Hampshire Tourism Fall Ad Awareness and ROI November 2020

ZIP. What is your ZIP code? \_\_\_\_\_

S2. Who in your household is primarily responsible for making decisions concerning travel destinations?

1. Me
2. Me and my spouse/partner
3. My spouse/partner → TERMINATE
4. Someone else → TERMINATE

S1. Please indicate if each of the following applies to you...

ROTATE	Yes	No
I regularly use social media like Facebook, Twitter or Instagram	<input type="checkbox"/>	<input type="checkbox"/>
I normally take at least one leisure trip a year that involves an overnight stay or is at least 50 miles from home	<input type="checkbox"/>	<input type="checkbox"/>
<i>The coronavirus/COVID-19 is impacting Americans' lives to varying degrees. However, for this question we are interested in your travel behavior under normal circumstances</i>		
(IF =0, TERMINATE AFTER SCREENING QUESTIONS)		
I regularly engage in some form of physical exercise like walking, biking or participating in sports to help stay healthy	<input type="checkbox"/>	<input type="checkbox"/>
I use video streaming services like Hulu or Netflix	<input type="checkbox"/>	<input type="checkbox"/>
I'm interested in taking winter vacations that involve skiing or snowboarding	<input type="checkbox"/>	<input type="checkbox"/>
I like to travel during the fall to view the changing leaves	<input type="checkbox"/>	<input type="checkbox"/>

AGE. What is your age? \_\_\_\_\_ [TERMINATE under 18 - over 65]

Social. Which of the following social networking sites do you use? Select all that apply.

- Facebook
- Twitter
- YouTube
- Instagram
- Travel review sites such as TripAdvisor
- Snapchat
- Pinterest
- Other, please specify \_\_\_\_\_
- None

1. Thinking about places to go for domestic leisure trips, what U.S. STATES come to mind as good places to go? (USE DROP DOWN LISTS)

STATE #1 \_\_\_\_\_  
STATE #2 \_\_\_\_\_  
STATE #3 \_\_\_\_\_  
STATE #4 \_\_\_\_\_  
STATE #5 \_\_\_\_\_

2. How familiar are you with each of the following states, in terms of what it has to offer as a place for a leisure trip or vacation?

[ROTATE]	Not at all familiar	Not very familiar	Somewhat familiar	Very familiar
New Hampshire				
Connecticut				
New York				
Maine				
Massachusetts				
Rhode Island				
Vermont				

3. How likely are you to take a leisure trip to any of the following states in the next year?

[ROTATE]	Not at all likely	Not very likely	Somewhat likely	Very likely	Already planning a trip
New Hampshire					
Connecticut					
New York					
Maine					
Massachusetts					
Rhode Island					
Vermont					

4. Which of the following states would you prefer to visit for a leisure trip within the next year?

Please select only one. [ROTATE]

New Hampshire	
Connecticut	
New York	
Maine	
Massachusetts	
Rhode Island	
Vermont	



# Questionnaire

1. Have you visited any of the following states since August 2020 for a leisure trip? How many trips did you take in each state since August 2020?

[ROTATE]	States visited since August 2020 (Select all that apply)	Number of visits since August 2020
New Hampshire		
Connecticut		
New York		
Maine		
Massachusetts		
Rhode Island		
Vermont		
None of these		

CV questions are to capture consumer perceptions and behaviors relating to the COVID-19 pandemic.

- CV1. How safe do each of these states feel to you as places to visit given the COVID-19 pandemic?

ROTATE	Very risky	Somewhat risky	Uncertain	Somewhat safe	Totally safe
New Hampshire					
Connecticut					
New York					
Maine					
Massachusetts					
Rhode Island					
Vermont					

- CV2. How safe do each of these locations feel to you given the COVID-19 pandemic?

ROTATE	Very risky	Somewhat risky	Uncertain	Somewhat safe	Totally safe
Cities					
Mountains					
National and State Parks					
Small towns and rural destinations					
Lakes					
Restaurants					
Indoor attractions like museums					
Outdoor attractions like hiking trails					

- CV3. Which of the following best describes your intended behavior within the next week?

I believe it is still safer to stay home and venture out as little as possible (only for essential items or because of my job as an essential worker)	
I will take recommended precautions, but I'm going to start adding more activities back into my routine	
I think restrictions have gone on too long and I'm going to resume as many normal activities as possible	

- CV4. Which of the following best describes how you feel about traveling this fall/winter?

I would not even consider traveling any time soon	
I will wait and see what happens in the coming weeks before planning any trips	
I am ready to start planning a trip now	
I already have plans to travel this fall/winter	

- CV5. Currently, how comfortable are you ...?

[ROTATE]	Not comfortable	Somewhat comfortable	Completely comfortable
Staying in the home of a friend or family member			
Staying in a homeshare like Airbnb or VRBO			
Staying in a hotel			
Attending a large outdoor event			
Attending a large indoor event			
Taking public transportation			

2. In the course of planning for any recent or upcoming trips to New Hampshire, have you gathered information in any of the following ways?
1. Requested a New Hampshire Visitor's Guide
  2. Visited the New Hampshire Tourism site, [www.visitnh.gov](http://www.visitnh.gov)
  3. Visited the Visit New Hampshire Facebook page
  4. Followed Visit New Hampshire on Twitter
  5. Followed Visit New Hampshire on Instagram
  6. Received e-newsletter
  7. Requested information about a New Hampshire trip in another way
  8. None of these

# Questionnaire

IF Q6\_2=1, ASK Q7

I:\Ads Master\New Hampshire\2020\Fall Awareness October 2020 Wave\Assets for survey\Website

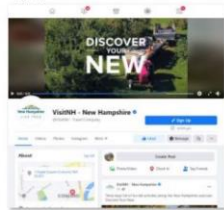


Q7. Is this the New Hampshire website you visited?

- 1. Yes
- 0. No

IF 6\_3=1, ASK Q7A

I:\Ads Master\New Hampshire\2020\Fall Awareness October 2020 Wave\Assets for survey\FB Homepage



visitNH Fall 2020 Facebook Landing Page

Q7a. Is this the New Hampshire Facebook page you accessed?

- 1. Yes
- 0. No

[ASK ONLY FOR: New England states (MA, NH, VT, ME, CT, RI) & New York]

IF q6=7, ASK Q7b

I:\Ads Master\New Hampshire\2020\Fall Awareness\enewsletter



Q7b. Is this similar to the New Hampshire e-newsletter you received?

- 1. Yes
- 0. No

8. Please consider the following descriptions that could be used to describe travel destinations, and indicate how much you agree each statement describes New Hampshire.

HAVE THEM RATE NEW HAMPSHIRE IF AT LEAST SOMEWHAT FAMILIAR AT Q2

[ROTATE]	1 Strongly disagree	2	3	4	5 Strongly agree
Is a fun and exciting place					
Always has something new to discover					
Is a good place to live and work					
Is beautiful					
Offers an attractive lifestyle					
Is rich in culture and the arts					
Is a good place for culinary activities, including U-pick farms and beer/wine trails					
Has great parks					
Offers lots of outdoor recreation					
Is safe					
Is a kid-friendly vacation destination					
Is easy to get to					
Is unique because of the variety of destinations and activities it offers vacationers					
Has interesting historical sites and museums					
Is a great place for winter sports such as skiing and snowmobiling					
Is a place I would be excited to visit for a leisure trip					
Is a good place for shopping					
Is a great place to vacation when traveling with children					

# Questionnaire

Offers great vacations for people like me					
Is affordable					
Is a good place for fairs and festivals					
Is a good place to go to the beach					
Is a good place for water activities					

(IF Q5 IS NOT NEW HAMPSHIRE SKIP TO AD SECTION)

Now, please give us some information about the trip(s) you took to New Hampshire since August 2020.

9. When since August 2020 did you visit New Hampshire for a leisure trip? (ACCEPT MULTIPLES)

August 2020  
September 2020  
October 2020  
November 2020

Now we'd like to ask you some questions about your most recent trip to New Hampshire.

10\_1. How many nights did you spend in New Hampshire during this trip? \_\_\_\_\_

10\_2. Including you, how many people were in your travel party? \_\_\_\_\_

ASK Q10b if Q10\_2 > 1

10b. Of those, how many were children under age 18? \_\_\_\_\_

ASK Q10c if Q10\_1 > 0

10c. What forms of lodging did you use during your trip? Select all that apply.

Luxury resort hotel  
High-end full-service hotel  
Mid-level hotel  
Budget hotel or motel  
Bed and breakfast/inn  
Airbnb  
Camping/RVing  
Home of family or friends  
Vacation home  
Other

11. Which of the following activities did you participate in during your trip to New Hampshire? Select all that apply. [ROTATE]

Hiking or backpacking	Wildlife watching	
Visiting a state or national park	Bird watching	
Bicycling or mountain biking	Scenic drive	
ATVing	Sightseeing tour	
Rock climbing	Golfing	
Horseback riding	Shopping	

Hunting	Dining at locally owned restaurants	
Camping	Visiting a noteworthy bar or nightclub	
Snow skiing or snowboarding	Farm to table dinner	
Snowmobiling	Winery tours	
Fishing	Brewery	
Visiting museums	Farmer's markets/U-picks/roadside stand	
Attending a play or concert	Canoeing or kayaking	
Attending a festival or fair	Boating	
	Dogsledding	
Visiting historical sites	Cross country skiing	
Snowshoeing	Ice fishing	
Ice skating	Other, please specify _____	
	None of these	

ONLY SHOW THE ACTIVITIES THEY CHOSE ABOVE PLUS NONE AND ASK:

12. Of these activities, please indicate if there were any that were a major influence when you selected the **destination** for this trip to New Hampshire. You may choose up to 3.

INSERT NEW HAMPSHIRE REGIONS MAP

13. Which of the following regions did you visit during your trip?

14. Thinking about your overall travel experience in New Hampshire on your most recent trip, would you say it was...?

5. Excellent  
4. Very good  
3. Good  
2. Fair  
1. Poor

15. When you think of your most recent trip to New Hampshire, what thoughts, feelings or emotions come to mind? \_\_\_\_\_

16. To better understand your travel habits, we are interested in finding out the approximate amount of money you and other members of your travel party spent while in New Hampshire on your most recent trip. Please estimate how much your travel party spent in total on...

**Please complete all fields – best estimate is fine. If no expenditures in a category enter a "0"**

Lodging/Accommodations \_\_\_\_\_  
Meals/Food/Groceries \_\_\_\_\_  
Shopping \_\_\_\_\_  
Entertainment such as shows, theater or concerts \_\_\_\_\_  
Other Entertainment/Attractions \_\_\_\_\_  
Transportation to New Hampshire \_\_\_\_\_  
Transportation within New Hampshire \_\_\_\_\_  
Other \_\_\_\_\_

# Questionnaire

17. Thinking about this trip, how far in advance did you begin to plan?

- 1...Less than 1 week
- 2...1 to 2 weeks
- 3...2 to 3 weeks
- 4...3 to 4 weeks
- 5...1 to 2 months
- 6...3 to 4 months
- 7...More than 4 months in advance
- 8...Don't know

18. Did you post any information about this trip on the following outlets? Select all that apply.

1. Facebook
2. Twitter
3. Flickr
4. YouTube
5. Blogs
6. Instagram
7. Pinterest
8. None of these

23. How likely are you to recommend a trip to New Hampshire?

1. Very likely
2. Somewhat likely
3. Not likely

24. Have you seen any advertising for New Hampshire as a travel destination?

1. Yes
0. No

Next you will be shown some travel advertisements. Please take a moment to view the ads and answer the questions.

## DIGITAL

I:\Ads Master\New Hampshire\2020\Fall Awareness October 2020 Wave\Assets for survey\Display Ads



VisitFallFY21\_foliage tracker\_300x600\_backup.jpg



VisitFallFY21\_road trip\_160x600\_backup.jpg

FallDigital. Please indicate if you have seen each of these online ads before.

- 1.Yes
- 0.No

FallDigitalB. What is your reaction to these ads?

1. Positive
2. Neutral
3. Negative – ASK FallDigitalC

FallDigitalC. Why do you feel that way? \_\_\_\_\_

## TV

I:\Ads Master\New Hampshire\2020\Fall Awareness October 2020 Wave\Assets for survey\Videos  
NH TOURSIM - FALL 30 -THIS IS WHERE IT ALL BEGINS\_DISCLAIMER.mp4



NH TOURSIM - FALL 30 -THIS...

# 473511827

FallTV. How many times have you seen this or a similar ad for New Hampshire?

# Questionnaire

- ☐ More than three times
- ☐ Two or three times
- ☐ Once
- ☐ Never

FallTVA. Where do you recall seeing the ad? Select all that apply.

1. On TV
2. Online
3. Don't recall

FallTVB. What is your reaction to this ad?

1. Positive
2. Neutral
3. Negative – ASK FallTVC

FallTVC. Why do you feel that way? \_\_\_\_\_

## SOCIAL

I:\Ads Master\New Hampshire\2020\Fall Awareness October 2020 Wave\Assets for survey\Social Ads



FallSocial. Please indicate if you have seen each of these social media ads before.

1. Yes
0. No

FallSocialB. What is your reaction to these ads?

1. Positive
2. Neutral
3. Negative – ASK FallSocialC

FallSocialC. Why do you feel that way? \_\_\_\_\_

28. Given all of these ads together, how much do you think this campaign shows a place...? ROTATE

	Strongly disagree	Somewhat disagree	Neither agree nor disagree	Somewhat agree	Strongly agree
Where I would be inspired and invigorated	1	2	3	4	5
Where I could reconnect with my family	1	2	3	4	5
Where I would feel free-spirited	1	2	3	4	5
Where I would be challenged to live life to the fullest	1	2	3	4	5
Where I could uncover new places or things	1	2	3	4	5

29. How much does this campaign make you...?. ROTATE

Want to learn more about things to see and do in the state	1	2	3	4	5
Want to go to the state website or request a brochure from the state	1	2	3	4	5
Want to visit the state	1	2	3	4	5

# Questionnaire

The following questions are for classification purposes only and will help us understand different groups of people.

**DEMOS** [ALL ON ONE SCREEN & DO NOT FORCE]

The following questions are for classification purposes only so that your responses may be grouped with those of others.

- D3. Are you currently ...?  
Married/living as married  
Divorced/Separated  
Widowed  
Single/Never married
- D4. Including you, how many people live in your household? \_\_\_\_\_ [IF 1, SKIP TO D6]
- D5. How many children under the age of 18 live in your household? \_\_\_\_\_
- D6. Which of the following categories represents the last grade of school you completed?  
High school or less  
Some college/technical school  
College graduate  
Post-graduate degree
- D7. Which of the following categories best represents your total annual household income before taxes?  
Less than \$35,000  
\$35,000 but less than \$50,000  
\$50,000 but less than \$75,000  
\$75,000 but less than \$100,000  
\$100,000 but less than \$125,000  
\$125,000 but less than \$150,000  
\$150,000 but less than \$200,000  
\$200,000 or more
- D2. Which of the following best describes your racial and ethnic heritage? Are you...?  
*Select all that apply.*  
African-American/black  
Asian/Pacific Islander  
Caucasian/white  
Latino/Hispanic  
Mixed ethnicity  
American Indian  
Other, please specify \_\_\_\_\_)
- D1. Are you ...?  
Male  
Female  
Other  
Prefer not to answer